



Public Library Planning

Public libraries in Virginia are required to develop and submit to the Library of Virginia a written long-range plan in order to receive state funding. Planning is an essential component in developing library service. The Public Library Association (PLA) and the American Library Association (ALA) have developed manuals and tools to help libraries assess the needs of their communities and set goals and objectives for future development. Since 1978, Virginia's standards for public libraries have recommended services and resources that should be available across the state. Standards do not exist by themselves, but rather should augment a local planning effort that identifies service goals that allow the library to meet the needs of its community.

The Public Library Association Models

Several documents have been published by the Public Library Association for use in the local library planning process.

Since the publication of *A Planning Process* in 1977, two revisions have been issued - *Planning and Role Setting for Public Libraries: A Manual of Options and Procedures* (McClure, et al., 1987) and *Planning for Results: A Public Library Transformation Process* (Himmel, et al., 1998). Each revision introduced new aspects to the recommended planning model.

Planning and Role Setting introduced the notion of role selection for the public library, defining eight representative role profiles that could be used by planners to describe the essential priorities of the library and guide the allocation of budget, staffing, and energies.

Planning for Results, among other changes, introduced the idea of "visioning" - a concise expression of what is envisioned for the community or of how the community will benefit from having a successful library. Previous planning models had been institution-centered, and this new step in the process seeks to create a stronger connection between the library and its community. *Planning for Results* also recast the eight role profiles from the previous planning model into thirteen representative service responses. This change incorporated libraries' experience using the original roles and reflected the growing application of technology in the library environment.

Planning for Library Excellence is designed to be used in conjunction with PLA or other appropriate planning models. The standards, guidelines, and planning profiles included in this document suggest levels of library service for Virginia's public libraries. Libraries and library services will benefit more if this document is applied to planning methods derived from the PLA model. *Planning for Library Excellence* offers a means for evaluating a library's progress, setting targets for future development, and providing benchmarks for evaluating the accomplishments of the library.

The Planning Process

Planning is an ongoing, cyclical process of assessment, forecasting, goal setting, implementation, and evaluation. It is a process that can be accomplished in a thorough fashion or in a more simplified manner. A library may choose between multiple approaches to take and strategies to apply. The most important thing about planning is to do it.

The planning process typically asks four questions:

- What is the library's current condition?
- What do we want the library to be?
- How does the library get there?
- Did the library get there?

Planning for Results offers a different approach from previous planning models. The approach suggested in this new model reverses the order of the first two questions. *Planning for Results* encourages the local library to study the community vision, or create one, to determine what the library should be and then to examine the current condition. Local libraries need to determine which approach is best suited for the library before beginning the planning process.

In assessing the library's current condition, information is gathered about the community - census data, economic reports, forecasts, etc. Information is also gathered about the library - annual statistical reports, user and/or community surveys, comparisons with neighboring or peer libraries. *Planning for Library Excellence* offers tools and information that library planners may apply in this phase of the planning process. By examining the standards, guidelines, and planning profiles, planners can produce a snapshot of the current condition of the library and identify possible areas for improvement.

The second question asks library planners to develop a vision and to make forecasts and projections. Library planners look into the future, typically five years ahead, and express how the library should develop. It is during this phase

that planners formulate vision and mission statements, identify suitable roles or service responses, and set goals for the library. Again, *Planning for Library Excellence* can be used as a tool as part of the library's larger planning process. Review of the document will identify standards and guidelines to be met. By reviewing parameters in the planning profiles, targets for future development can be set.

How does the library get there? Library planners set the library's service priorities, translating them into written goals and objectives. Objectives are measurable and time-specific, and they provide the basis for evaluating the library's progress. Planners then design activities or strategies to accomplish the objectives.

The process of reviewing and evaluating answers the question, "Did the library get there?" Evaluation is an ongoing monitoring process to ensure the library does not move away from its priorities. Evaluation also involves annually assessing the progress made by the library and the level of satisfaction of library users. Review and evaluation also includes assessing the planning process and its impact on library service and staff. Revising the plan and the process to improve services is a desired result of this step.

There is no one best way to plan. Differences in communities and libraries will be reflected in the process, in the strategies and techniques used, and in the final written document. Some libraries will undertake a rigorous planning process; others will pursue a simpler one.

An individual library can set its own pace for the planning process. The process is flexible so all libraries can plan for improved services. Each community deserves the good service that results from effective planning. No library is too small not to plan.